

VENDOR MEETING SPREADSHEET

Contract #		Contract Name:	
PeopleSoft Supplier ID		Location # for ACH	

Company Name	Need to complete AA
DBA	FEIN

Main Address/Location:	Main Telephone(s): 1-	800-
	Website:	

Other Locations:

Attendees:	Name	Title	Email	PH:
1				
2				
3				
4				

Review of the following:	Item	Completed	Follow up Information Needed - Detail - Who will follow up	Follow up Email & to whom
	Contract - signed			
	Performance & Support Requirements			
	Pricing Reviewed and Acknowledged			
	Review price request change			
	State of WI - PO review and where information is location (Ship Date, where to ship, unit & total price, where to send invoice, etc.)			
	Contract Contact List			
	How/where to submit a proper invoice			
	Are there any additional forms/sign-off's to complete when sending invoice			
	Who should be included on the invoice email?			
	Has vendor completed all necessary setup paperwork for system			
	ACH paperwork			
	Contract Cooperative - how correspondance / orders are completed			
	Contract location on VendorNet			
	Review User Guide and ensure information is correctly posted and understood by Vendor			
	Review Report Template			
	Set up outlook calendar invites for quarterly reports			
	Who are the 3 people to send invite to			
	Set up outlook calendar invites for quarterly or next vendor meeting dates			
	Who should the meeting invite be sent to?			
	If there is an issue - who is the main contact - include direct telephone number (and or mobile) along with email			
	2nd contact			
	3rd contact			

FOLLOW UP ITEMS:	QUESTION / ITEM	PERSON TO FOLLOW UP	DATE TO BE COMPLETED BY	Email Sent/Date
1				
2				
3				
4				
5				